

Department of Ed – School Portal, User's Group

Participants

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Gary: Again thank you for the input that we received after the last conversation, it was invaluable. The design team went back to the drawing board and incorporated a number of the suggestions that you all made. What we would like to do today is walk through the portal again and get your comments.

- Trouble with the phone, background noise-

Bart: Thanks for the input last time and joining us last time. We've gone back and implemented some of the suggestions you made, for others that were made, we've had to go back and do more research and we are going to cover those today and provide answers for you. What I would like to do is a couple things. One is to go through the site as it stands now and get some direct feedback from you on the site. And second, to cover off areas where you have requested some additional functionality and we will talk about whether we will have that functionality for 9/30 or not and in most cases where we will have the functionality we hope to be able to demonstrate it by NASFA (NASA?) so that we can once again get the benefit of you reviewing it and giving us feedback on it.

The first thing we did, was in the SFA Links area. We went and spelled out each of the acronyms. Now that does consume a bit more real estate and makes this column for SFA Links quite a bit longer and you have to scroll down the page to get to each of the links. Apparently, your feedback on whether this was a good change and necessary, or whether we need all links spelled out. And whether

these are all links that we need. It was mentioned last time that maybe some of these weren't used quite as often as others and that you all would have some valuable input on the collective set of links that we kept up here. So why don't we start in the My Links area. Any reactions?

Randy McCready: Under My Links?

Bart: Excuse me, in the SFA links area on the homepage.

Feedback (2 voices): I like it

Bart: It works well spelled out?

Feedback: Yes

Bart: I will assume that silence means we prefer it spelled out over the acronyms. And again as you all have thoughts about whether these things should be there or not, whether we have too many links here or there are other ones, please send those thoughts into Gary and we will continue to update this through the course of the next several months.

Feedback: I noticed that PEPs is on there twice.

Bart: Yes we put it in two different places. In the bookstore and then all the way down under Participation and Funding. Is there a need for it to be in both places or is it redundant?

Feedback: I think that especially if real estate is an issue, not that that's alot, but I think just one link per topic is enough.

Feedback: Also, there is a great bit of redundancy between the Exchange Data and Student Records, is there any way to utilize that space more effectively?

Bart: Good thought, whether we can actually combine those two categories?

Feedback: Most of those pertain to the students, do they not? With the exception of maybe QAP?

Bart: Gary, Kitty any thought on that?

Kitty: Well, I was looking at PEPs and it made more sense to me to be listed under Participation and Funding rather than the bookstore. The comment just made about the students, yeah, it does look kind of redundant. I guess you could collapse and just make it Student Records and pull the QAP down there. What do you guys think about that ?

Feedback: Yeah, that's the one that throws me...the QAP.

Kitty: The QAP thing ,if you think about it though. Those records are micro-detailed, so you could really put that under Student Records and probably nobody would have a problem with that.

Comment (Holly) : The differentiation we were trying to display and maybe it has no value and you need to tell us is that under Exchange Data, those are sites where you send us student records, student data and in the Students Records area, was more of a look-up, where you can look at their information, but not necessarily send us anything. I am not sure if there is a value to differentiating that way.

Kitty: What if you said, send data and look-up records or something so people knew that.

Bart: I think the overall suggestion is that maybe we can combine those 2 categories because they do have redundant links to them.

Feedback: Yeah maybe, once you click on it you can either send it or lookup data. You'd get that kind of choice. (*General murmur of consensus*)

Bart: oh, ok ...for function, send of lookup.

Feedback: Yeah, that would be cool.

Kitty: What would you title that section then?

Gary: Yeah, that was my next question.

Bart: If I can ask before we go to lookup or send. Are you going to differentiate underlying sites here? Or will you go to the same homepage and then make a decision, because it's the same underlying URL, right?

Comment: Right.

Bart: Yeah. So if we were to call the whole thing Student Records, I think was....

Kitty: Well that again, the QAP is the one thing that's a little goofy under there, but...

Feedback (Randy): Well I don't know if there are any other QAP schools on this call, but I was part of a QAP school in the past and the software is strictly student data.

Kitty: Ok, so it works under there?

Feedback (Randy McCready): Yeah

Kitty: Ok.

Randy: But...

Kitty: Cool, you have more experience with it than I do so, cool.

Randy: But I guess I wonder what something like FAFSA or Loan Consolidation would be under there because I look at it more like something the student is doing, not necessarily the school.

Comment (Colleen): That's absolutely true. We included those links there because we understand you are often assisting the student with their responsibilities and with their pin numbers, of course could access the FAFSA record as well and help them maybe make corrections.

Feedback: This FAFSA has no connection to our EDE. Is that what you are telling us?

Comment: That's correct

Kitty: Are those two FAFSA and Loan Consolidation, they're sort of primarily so financial aid records can get to them easily if a student has a question but they wouldn't actually need to use them in their work. The way I am hearing that?

Colleen: Yes, most of the time

Randy: I would even throw in to that Direct Loan Servicing System.

Kitty: To me that makes sense that those would be up there for the reason that Colleen mentioned. Does that make sense to you guys?

Feedback: Yes

Kitty: It's just kind of nice to be able to see something that people log-in and say well I was doing this up at the website and you can go look at it. Maybe that will help you.

Colleen: Yeah, we are trying not have tunnel vision in the school system and only think about schools. Because you obviously also deal with the students, so there are also for obvious reasons, the job that you do and the resources you need to access.

Kitty: Ok, so if we go back to the question about the heading, what would you call the heading if we got rid of Exchange Data and Student Records and just made it the one set of links, what would you call it? Or do you like one of those headings?

Randy: I could go for something like Student Data

Feedback: I think so too. *(murmurs of agreement)*

- *Someone having trouble getting to the site* -

Bart: Ok, are there any other suggestion in respect to the links inside then, what will now be Student Data, apart from just consolidating the duplicated ones?

Feedback: I am just thinking out loud here, but would there be any benefit to anyone else to have the Student Access Site, separate from the Office Access Site?

Kitty: Well now, the Student Access site is going to be part of the student's portal when that comes up, right?

Comment/Question: Are you thinking that the students are going to be using this as well?

Feedback: Probably not, but I am trying to figure out why I would be using it? I probably wouldn't but maybe some others would.

Feedback: I can't see that I would be using it either.

Feedback: No, I wouldn't.

Feedback (Randy): The only way I would use something like that is if I had a student in my office and it would make it easier to point the site to them....to say this is what it looks like. That would be the only reason.

Comment: Right, that's why it's there.

Feedback: I don't know how applicable this might be to others. We have student links on our homepage and it would be my sense that students would feel more secure getting into it themselves from links. I could access on my pc, rather than accessing it for them.

Feedback: I agree with that too.

Kitty: If we take that off.....we could take those off andhow do you come up with it if you need to come up with it fast to give somebody? So would just dig around for it or ask somebody?

Feedback: It doesn't take up much room, and to have it there if you need it, seems that we should leave it there.

Feedback: Would it better to just have a category called Student Resources and have a drop down box listing the different sites that a student can go to, so we have site addresses.

Kitty: The Student's Channel is going to bring up a Student Portal, which will be exactly that, only huge. So I don't know if...at some point these portals are going to link to each other, so instead of having an accumulative resource, you're quite right, so maybe with that thinking in mind the link to the Student Portal takes care of these and we can take them off here.

Feedback: Can we assume that if the Student's Portal will take us to that particular student's record, assuming we have the pin number or whatever, that we would see the same information and be able to give the same assistance that the student might be looking at and not know what to do with?

Comment: That's right.

Feedback: And we can access that simultaneously, with the same pin number? Or are you thinking about the student being in front of you and then going to the link?

Comment: I am not sure that you can access it simultaneously. I was thinking more that you have the student in front of you and they gave you their pin number.

Feedback: And that is the reality.

Kitty: Is that? Do students give you their pin number?

Feedback: Yes, they do not know what to do with this stuff.

Feedback: Yeah.

Kitty: OK

Bart: Where do we stand now with this Student Data category? Are there links we want to take off and make it accessible through a student portal ? It sounds like there is still some use as an administrator to have access to these links directly if you have a student with you.

Comment (Colleen): And those who don't want it there have the option on the My Links page.

Kitty: Did everybody here what Colleen just said?

Feedback: No.

Colleen: We haven't gotten there yet on this demonstration yet, but the personalized page will allow you to remove those links. Whether you want it in your way or you don't want it in your way. You can remove those links you don't use in your day-to-day operation.

Feedback: OK

Bart: Ok. We will consolidate under Student Data and make it all one set of links up there. There was also the suggestion that maybe PEPs didn't need to appear twice. Just looking for other opportunities to make this column as intuitive as possible.

Feedback: I think it's probably better to put that one under Participation and Funding instead of Bookstore if you choose one.

Feedback: I would agree

Feedback: I agree

Feedback I think that's true

Bart: Are there any other thoughts on the rest of the links?

Randy: Didn't we talk the last time about collapsing the different Training/Conferences under like one Conference heading and putting it outsort of to save some space so could just go down into the next page where you would then get the options?

Comment: Yes, we did

Comment: Yes we did, and IFAP currently does that, puts all the conferences in one place and that's where we should be linking to.

Bart: Right and we added the link SFA Training/Conferences, which takes you to that page. I think the URL maybe even live. It seems to me that it takes care of the other ones that are under here.

Kitty: Except for SFA Coach

Randy: Yeah, I would leave SFA Coach

Bart: Right. Ok, so that's not the link we are looking for here?

Comment: SFA Training and Coach.....(intelligible)...separate page for conferences on IFAP that we could identify.

Bart:OK, so under Training and Conferences, we want three links? Is that correct? SFA University, SFA Training/Conferences, and SFA Coach?

Feedback: Yes, sounds good.

Feedback: Correct

Comment: So, SFA University is different from the SFA Training/Conferences?

Comment: I see, so we have Training/Conferences and Coach. How does that work for you guys?

Feedback: That works.

Feedback: That makes sense.

Question: Say that again, how you differentiated between Training and Conferences? Anything that is.....

Answer: EAC Conference and NSDL Training that would be separate, that's the way I understand it.

Kitty: Title 4 updates would be training but aren't really conferences, stuff like that.

Bart: So it's SFA Training, instead of SFA University, is that correct? Conferences and SFA Coach

Background feedback: if they are talking about Student Records and students accessing and we link that to our page, then we...I am not sure where they are going with it. The portal for student records that students have access to, then there should be one link to it listing all this and then we can link it to our page.

Question: Would it be preferable to have SFA Training and then in parenthesis 'SFA University' or SFA University in parenthesis 'Training.'

Feedback: It seems like you want to use University for some reason.

Answer: Yeah, that's what it's called basically?

Bart: That's internally isn't it, right now?

Comment: No, it's both

Kitty: Ok, so SFA University is a relatively new term. Is that something you recognize yet as the new training arm?

Answer: No (chorus)

Kitty: I am wondering if we should make that SFA Training for now and then change that in another release if it gets to be what people recognize as the training arm.

Comment: How about the opposite, let's get them use to the term University and put training in parenthesis afterwards, to help clarify.

Comment: How about that? We are going to put the term SFA University and then in Parentheses place Training.

Bart: And then Conferences and then SFA Coach.

Bart: Ok, any thoughts on the Bookstore and Online Library?

Question (Colleen): SFA Coach, the name SFA Coach is that well known to you all what that is?

Answer: Yes (chorus)

Comment: Good

Feedback: It would be great if you can make that totally web-based instead of pc based.

Comment: We have that planned. We agree with you completely on that. Probably not first version, but we are definitely working toward that.

Bart: Ok, can we get some reaction to Bookstore and Online Library and again these are intended to indicate different types of publications.

Question (Randy): Why is Quality Assurance Program separate on the Online Library? I haven't been part of the QAP for 5 years but I didn't think it had advanced that much it would have a separate line under a publication.

Feedback: We're also a QA school and we agree.

Kitty: Is the main reason you would need the QA link is to download the new software from time to time?

Feedback: Well we would probably go into the download site.

Feedback: SFA download

Feedback: Yes, that's probably where we would go to get information.

Kitty: Which is a fare under Bookstore. So what you are saying is that you wouldn't look for a separate link that said QAP?

Feedback: Not at all.

Kitty: If there was a separate link that says QAP you would expect more stuff to be there?

Feedback: That is correct.

Feedback: I also think though that the QA Program is going to be changing significantly over the next few years and I am not so sure that having that there is good planning for the future.

Kitty: So do we put it up there now or put it up there for a future release?

Question: leave it up there or put it up there later?

Feedback: I suggest that it be left, but....

Kitty: It has the download stuff there too?

Comment: I particularly don't like dead-end links.

Kitty: Yeah, see that's the reason I was asking that question because I think whoever that was that spoke is right. But there won't be there that much there for awhile, except for the software to download.

Question: How many schools are really involved with QAP?

Answer: About 150

Question: Out of?

Answer: Seems to me like that is wasted space at the moment.

Feedback: I concur.

Feedback: So where could they go to get information out of this space for the QAP program?

Bart: Well, again is an option to put whatever you want on your personal page. That's an option or a good one in this case or not?

Feedback: What is difference with the QAP on the Online Library versus the QAP under the Student Data part at the top?

Feedback: I would that the think the link would take you to the QAP homepage, which then allows you to get information about the program and download the software. I would think one link would be fine if it takes you directly to the QAP homepage.

Comment: That's perfect...exactly.

- *Someone enters the call* -

Bart: So the recommendation in respect to Quality Assurance Program is to drop it from the Library, but keep it up on Student Data or just get access to it through the Online Library.

Feedback: Because I understand how important the QAP is, even though the number schools that do it are limited, I think it's nice to have it out there so people know that its there. My opinion.

Bart: So keep it under Student Data?

Feedback (Randy McCready): That's what I would think.

Feedback: Well, it's a little confusing under Student Data, because all we are doing is transmitting the information, basically. So I kind of struggle a little bit under Student Data.

Question: Are you the one who is the QA school now?

Answer: Yes, we might look more to the Online Library, because we go for many other reasons to the website. I mean, most of it is uploading and downloading information.

Feedback: She would have a better feel for that than I.

Feedback: Yeah, we are not really looking into student records specifically, when you talk about the QA program globally.

Feedback: I am from a QA school as well, and I agree. I would find it more accessible in the Online Library. It would make more sense to me there.

Kitty: So what you are saying is take it out of Student Data and just keep it under Online Library?

Feedback: Yes

Kitty: And then go to QAP homepage from the Online Library.

Feedback: Right

Feedback: Which ever way we need to be in the QA program.

Feedback: We're in the QAP program and we also agree with that

Bart: Is there value in keeping separate the Bookstore and Online Library category?

Question: Can they not both be accessed from the same drop down box?

Question: What is the purpose...how are you using the term bookstore, to purchase things, download things? You know, you are the one that came up with the two different categories. Why did you have them separate, what was the idea behind it?

Comment: The person who came up with those terms is not here, but the I can recall what he said. The idea behind the bookstore was you actually took something away from that site, and in the case of the publications you can order bulk of publications, on the download site you actually receive the software by downloading it and the Online library being more reference library, see and review and query against documents....I am not sure it's a real great differentiation, but that was the thought behind it.

Comment: That was the distinction that was made.

Comment: Again, If you find no value than let us know.

Feedback: I see that distinction and in a sense I kind of like it. There's a subtle difference, when I saw the Bookstore I saw it as the equivalent as the cart on email. In the library I think of doing research and I think there is a difference. We need to keep in mind, that we are going to have all kinds of users from the 25-year old plus vet like me, and I am not that computer literate, so we need to keep those old terms for me, to the fresh, astute 29-year old coming into the profession.

Gary: Like Me, you're talking about me aren't you?

Question: Do you see any benefit in changing the word Online to Research Library? Or Reference Library?

Feedback: Online is redundant, it's there. *(General agreement)*

Feedback: Reference library sounds good.

Feedback: Online library doesn't tell us what is there.

Feedback: That's an excellent idea.

Feedback: Reference does make better sense.

Bart: Also under the Reference Library should we have a separate bullet point to get to the IFAP homepage? Because right now, it's intended to go to list of publications for that first link.

Feedback: I am not following you, IFAP is listed so what....?

Bart: If you hit that link it will actually take you to the homepage for IFAP, rather than the list of publications themselves. We intended it to go to the list of publications first.

Feedback: Oh, first?

Comment: Well, the way it's written is the way we intended it?

Bart: The broader question is should IFAP have a separate bullet that will allow you to go directly to the IFAP home page?

Comment: Do you still want to make that distinction, that's the question?

Feedback: How are you going to use the IFAP page from this moment forth?

Answer: Until the Modernization blueprint marches further along the path where are systems are more fully integrated, IFAP will remain an entity in and of its own but ultimately the information contained on IFAP will just be the library for the portal.

Question: Does it need to be a whole separate heading then for the time being?

Answer: You tell us

Feedback: Because this to me is confusing.

Bart: Yeah, and right here you have two options. I think the intent under Online Library was to allow you to go directly to 2 links that are actually residences of the IFAP site itself...one was Publications and the other Publications by topic. And the question becomes, if those are the primary two links you go to then what do we need to go the IFAP homepage for?

Comment: Our intention was to take you directly to the publications without having you click to go through another front door.

Bart: And we also have the ability to search IFAP directly from this page.

Comment: You would also have the opportunity on the personal portal to put an IFAP link in....to the homepage.

Feedback: I kind of like the IFAP page, again...only because I don't know what I am really looking for and what I want. Seeing that most frequently visited publication, kind of helps. Because if you took me directly to the publication by topic, I don't know.....it makes me know never mind, so never mind. I just confused myself.

Feedback: When I think of this, it almost does away with the IFAP page. And I am not sure...how much would I go to the IFAP page if all of this is now going to be incorporated right on this page?

Feedback: It's kind of hard to teach an old dog new tricks and we've been taught to go to the IFAP and there's a comfort level there.

Gary: You can set it up on your personal page.

Feedback: That's true. That's a valid point too.

Bart: So is there a general consensus, the general feeling is that it is okay to go with the links as they are listed without referring directly to the IFAP page?

Feedback: Yes. (*General consensus*)

Bart: I think we are through the SFA Links, if we could just turn briefly to Participation and Funding, the very last group and then ask are these the right links to have under this category. Are we missing anything?

Feedback: Let me ask something, if a school is already into the program and then they are adding something weird like a branch site or whatever, I wouldn't know which of these to go to. I mean I know what GAPS is about ...but between EAPS, approvals to participate and PAPS, I wouldn't know.

Comment (Kitty): EAP is what you would use for that purpose, the PEPs link takes you to the tool extract that is up on the web now. It gives you school information, I believe. Is that right? And the EAP is what people would have been using to do their re-certification, for adding branches and whatnot. In encouraging them to do that rather than send in paper. And that won't change.

Feedback: I guess that's my problem. We're more use to doing the EAP application or re-certification.

Feedback: Maybe we should change the title and add 'and' re-certification

Kitty: For Approval to Participate and Re-certification. What would happen if you added 'and' for re-certification. Does that help?

Feedback: Yes.

Comment: Then you would know exactly what it was....

Feedback: Exactly

Kitty: ...Once you saw re-certification.

Feedback: Because I don't need to apply, I am already participating.

Kitty: ...right you just need to re-certify. Ok.

Feedback: Do we even need that EAP in there, does anyone use that term?

Feedback: No (*consensus*)

Feedback: Application to Participate may even work.

Feedback: Yeah (*consensus*)

Kitty: So what I am hearing is the EAP is used here so that people here recognize what it is, but it really doesn't mean much to you there.

Bart: So are we saying Application to Participate and Re-certify?

Kitty: I think you are going to need to keep the EAP though, because you are also going to have people here hitting it that may not recognize it if you take the EAP out.

Bart: Ok, well consistent with the scheme we've used elsewhere, what if we said Application to Participate and for Re-certification, parentheses EAP.

Feedback: Then that way you guys can get use to it.

Kitty: There is a lot of change on both sides of the wire here and everyone has to get use to a bunch of changes, that's true. And that works for you guys that will probably work for the people here.

Feedback: Good, that works.

Bart: Ok, we are done with the links, unless there are any further comments?

Feedback: None

Bart: Let's look at the headline section. That's a brief edit that we made there. The feedback you gave us was that within the SFA headlines, there was both a general news category and then there was a category of things more directly related to changes in the way you might work. And so, we tried to make that distinction here and give a couple of examples. Does this work for you? Would you recommend typing it differently?

Feedback: I like it. (*consensus*)

Bart: OK. I will comment then. We will leave the headlines the way they are and I will comment just briefly on search. One of the request that came up last time was could we check into whether we could do a narrower search. That is could we search by type of publication, regulation, partner letters and so forth and the answer is that capability will almost certainly be there for 9/30 and that the IFAP dbase is being tagged or organized in a way that it reflects about 30 different categories within that dbase and we believe at this point in time it is possible to setup the search engine to search against those particular tags or types of publications.

In respect to search, we will have an advance search option that will allow you to have more capability to search against those particular application types, that will allow you to search archives using date ranges and so forth. So we are in the process right now of learning the full robustness of the search tool

and we're looking to see what is feasible to have in place by 9/30 and then putting together a couple of pages of advance search that lay out the options for you. We intend to have that ready, a first version by the NASFA conference. So that you can get a look at it there and give us some feedback, and we hope it will be very much on track with what you are looking for.

The things that you also asked for in search, is topic based filtering of news and events. And we will go down to the Calendar section in a little bit.

That we cannot, at this point say with certainty will be there or not. Depends partially on the approach that we take on searching for topics within events or in deadlines or MPRMs. They are some native capability with in the search engine where you can specify terms, I don't think we are actually at this point planning to code each event, in terms of certain categories for search, that is probably a bit further out if we decide to do this and may prove to be the case that the search engine itself...(intelligible) so we would like to look at the functionality and see how it works and whether it's worth the incremental investment in tagging each and every event or whatever and make them searchable by topic.

I covered some the requests you asked about search, are their further requests about search?

Feedback: I don't think it was about to search, but we asked about a dbase of experts? I don't see that being added.

Bart: That is correct. The dbase of experts....I believe there is a listing of experts within IFAP that you can get to, but I think the request you all were talking about was a document to have a link to an expert associated with that topic, for example.

Colleen: In the member services portion of IFAP, there is a page called the SFA Customer Service Centers that gives the general numbers, if your issue is software related, policy related issues, not specific names, but numbers to the center. We do plan to enhance and expand that to ensure that we include the state or regional representatives for instance for the campus based programs, or the client account managers to provide some more detail in that regard. That is probably as far as we will be able to go 9/30.

Bart: So the answer is that, we will not have a directory of experts by 9/30. It is recognized that it is a very high demand item and it involves more of an effort on the content side in assembling that list of experts and the right kinds of information with those experts, than it is a technology issue.

Question: Do you have any idea at what point that can be initiated?

Colleen: The enhanced list will be available with the portal, but as Bart described it being in a document and having a quick reference to an expert is something we will have to look at as a future version.

Question: Are email addresses already on there?

Answer (Colleen): In some cases they are, that is something we should look at to expand.

Feedback: I have not had very much success with the phone numbers, so email addresses would be better, I think.

Kitty: What has happened when you tried the phone numbers?

Feedback: I get an answering machine and no call back.

Bart: Ok, so we hear you and there is strong demand for directory of experts and someone on the other end of the contact. However we make it.

Bart: One other thing that was requested. Not quite in the search category, but the ability to see training by region. Again something we are looking into, and it is possible that that maybe in there by 9/30, we are investigating what it would exactly take to make that requirement happen.

Isn't that right , Colleen?

Colleen: Yes

Just coming back to some other requests that were brought up last time. And we may or may not want to continue with this one, but there was a request for a financial management section in the links. Is there any further thought on this? Has the issue been addressed? And what might we put there if there still is this request?

Kitty: Did someone ask for something in addition to GAPS?

Bart: Ok. Any input on that? If there is no feedback on that, then we will take it off the list.

Bart: On headlines, and maybe it makes sense to jump into the Calendar of Events, but there was a request to archive headlines. We think that is quite doable, again I am still playing a bit off of search. But we will look into that. We do think that is feasible and it should be there. If we go into the SFA Calendar of Events section we tried to organize it to make it more oriented towards a particular types of categories of content that you were asking for.

We've also on the right hand side, if you can see, we have moved away from trying to display a week at a time, because as we got some content to populate some of the dates it seemed like the way that we were doing it before, trying to display a week at a time on the right would lead us to too many items to present on the homepage. So we thought we would give you the calendar and we'd show you the current day's events and then you have the opportunity if you click on events themselves, what it will do is display the week ahead or events coming up. We think that you probably want to get a look at the sub-categories, which are events, training, deadlines, MPRMS just perhaps within a month's perspective. Let me see what's happening next year. We heard that request, we didn't actually make that happen this time, that probably is a view that makes sense to incorporate. Any comments on Calendar at this point? Does this work for you? Is it still off the mark? Would you be interested in having it organized differently?

Feedback: I like it (consensus)

Bart: OK, any suggestions for improvement at this point?

Feedback: No, it looks good.

Bart: Great. Let's go back to the homepage. Now we will move over to the personal page. Many of the things we have talked about will be similar on the personal page. There are a few more headline areas....I see we haven't corrected our spelling error, the Sallie Mae, but be that as it may. There are a couple of things we are looking for feedback on, under the links area we opted for using just the acronyms for the sites, thinking that maybe if someone had book-marked it here or specified it as a preferred link, they may know it and refer to it by the acronym, but that may not be a good assumption. Would people prefer to have these acronyms spelled out as well?

Feedback: I think it's ok as an acronym on a personal page. – *Consensus*

Bart: Ok, we expanded the headline section to include both the SFA specific new and Policies & Rule Changes from the homepage, but then are giving you the option of having general education news and news from other sites you may want to be monitoring and here its not quite clear what level of functionality we can get by 9/30. One option is in the headline areas to put a couple of links for new sites you might want to monitor on an ongoing basis. The second option, and we are checking into it, is the ability to actually go out and monitor the site for headlines that are of relevance to you, content that is of relevance to you, pull that off and populate it into this headlines box. It's a filtered external site a set of topics of relevance to you specifically. And what we'd do is build in a little bit of help so you can easily set up those preferences and monitoring of specific topics by site. Whether we can actually deliver that by 9/1 depends on the degree of overhead that creates within the system as a whole, to monitor the site for individual preferences, those are things we are investigating right now, at a minimum we will be able to put general links in this box that you could select and monitor on an ongoing basis.

Kitty: Does the idea of monitoring sites you can select of interest to you out there?

Feedback: It doesn't for me.

Bart: This is important feedback for us to hear, since there is an investment that needs to go on in building that functionality.

Kitty: Do we plan on asking for feedback at NASFA?

Comment: Oh, yeah.

Kitty: If there are certain things that you are trying to stay on top of and there may not be, some of you may have needs to stay on top of certain kinds of news and what he's talking about is training your site to look for those things.

Question: Something similar to the Ed. initiatives?

Kitty: Or it could be you want to know everything that is said about the Univ. of Phoenix,

Feedback: I see.

Kitty: So anything of particular interest to you and some of you, may just be so far underwater all the time that you don't need to know or care about. Some of you may have information needs that aren't being met because there is no way to meet them. Please think about it between now and NASFA.

Feedback: My mindset is that is going to be Dept. of Ed./Education/ Financial Aid type information. I will get my general news from other book-marks. So the other news part of it I probably won't even try to get it to work for me.

Bart: Good feedback, it's complicated to set these things up and often more effort than they are really worth.

Bart: We have under My Links (as in the case of an earlier version) created the opportunity for you to specify certain sites for you to easily link to from here and that may be the simplest and cleanest answer.

Feedback: Yeah (*consensus from the group*)

Comment: I think it's certainly something to look at in the future and later on down the line you have a better example of the kinds of information that can be provided it might enlighten people

Kitty: So what you are saying it might be beneficial to give you and the school and the rest of the community, some examples of how it might be used. We can do that.

Bart: But probably not for 9/30.

Kitty: And it doesn't sound like it's a burning issue.

Feedback: Not at all.

Feedback: It's not a burning issue, but think part of it is the timing. It's a not yet burning issue when we are looking at budget.

Kitty: Well let me ask you though, when for you and your team, when in the year are you looking at budget?

Feedback: Well, when I am talking about budget I mean congressional budget....appropriations. So I may be looking at it and monitoring it and when do I need to get that fax off, when do I need to get in touch with ASKW or whatever.

Kitty: So you are thinking primarily in terms of monitoring what is happening on the hill. So are any of you involved or asked to be involved in terms of environmental scanning, what else is happening in your sector among your competitors or mainly what is happening on the hill?

Feedback: I think it's a combination of both. And I think this is where we as a profession have kind of slipped. We are not on top of it as much as we should be. We are so inundated with environmental scans and what's going on in Congress, we should be actively involved with that and for some reason we are not because of information overload or whatever, but the more information I have accessible the better I can respond. This is the position my institution needs to take.

Kitty: Half the people sitting on this end of the call have been financial aid directors and we know where you are coming from...you are busy. Why we are even bringing this up is that maybe somewhere down the road, this is a resource that would help you

Feedback: Exactly, you say not 9/30 but or whenever, but what I want to do is go to a page and boom it is there. Whatever the issue is that I have got to follow.

Kitty: Is this Mariko?

Answer: yeah

Kitty: Ok, I want to talk to you about that offline later.

Feedback: I think that is an excellent decision making tool and I think in the future it should be provided even if the directors don't have time to utilize that information, they might provide that to their supervisors.

Feedback: Exactly. That's what we were sort of wondering about. Wouldn't it be nice in the future to be able to handle that resource to somebody else in the university, and say here, this might help you.

Feedback: I agree

Feedback: Thanks

Feedback: Going back to My Calendar, going down to the bottom where you have events, training, deadlines and those links, would it be helpful to put that on top above the month? Since we may not see the rest of that at the bottom, for those of us who have to scroll.

Feedback: We might miss it, just put it above so we can click to it. Just a suggestion

Feedback: I hate to agree, but I agree with Mariko.

Bart: Any other suggestions at this point?

Bart: I think that takes care of what we heard of suggestions last time and where we have gone with things. I think there was one other request in regards to email and I don't think we fully understood the requirement of the request...so if the person who suggested it is on the phone that would be great. And what the options might be as well to work between your current email system, just by minimizing and this portal. But the request was not really clear.

Comment: I think it was Jarrod, and he's not here.

Bart: We'll get back to that.

Feedback: I have one more comment and I keep looking at this calendar and it keeps coming back to me. If I am looking only at this current week, can I go to any other week at a time or am I just limited to this current week?

Bart: That is an excellent suggestion and we need on the My Calendar Events workspace area. We need to make an intuitive way to allow you to move between weeks. We were discussing that exact thing this morning and if you actually went to the events, deadlines, or training page you would see a version of the calendar where underneath it we note previous week or next week. We are still not as happy as we could be with that option, so we are going to look for a couple of different ways to give you that ability.

Feedback: I keep thinking if its happening this week, I probably already missed it.

Feedback: Oh, yeah.

Kitty: If you click to the left or right arrow on each side of June, will that take you to the next month?

Bart: That is the next month, yes. That is the intent.

Kitty: So that is intuitive. Are you saying that is the previous week and the next week that don't work so well?

Bart: Yes

Feedback: So if we went from June to July, what would we see in July?

Bart: One of the thing we haven't got here is a full month's listing of events.

Feedback: Right! That is what I was looking for.

Bart: If we could provide a month's at a view, whether we need a week at a view as well?

Feedback: I don't think so.

Feedback: I would rather see a month at a time.

Feedback: It all depends on how much you want to scroll.

Feedback: If you can't see a week's worth in a short amount of space, then there must be a lot in a month.

Feedback: I am having to scroll through the week, so....

Bart: We have a couple of options then, whether we need the ability to link to weeks within a scrollable month or exactly how we implement that. But it sounds like you have a need for both a week's view and a month's view. Particularly given the amount of content. We will look into that and maybe we can push the thinking on that.

Bart: Great.

Comment: What you like to take a look at IFAP? Does anyone care about the IFAP page?

Bart: Does everyone know how to get to the IFAP page?

Answer: No

Bart: You back to the home page and go to online publication and the first link will take you to the IFAP homepage.

Gary: If you click on SFA news...you will see this is a different layout you are use to.

Feedback: It took us to the publications page.

Gary: I wanted you to look at the layout, do you like it?

Feedback: yes

- Chatter about Napster -

Gary: Any comments on the IFAP homepage?

Feedback: There is a little bit of duplication on the publications, its on the left hand side... you have the links on the left hand side as well as the middle.

Comment (Randy McCready): The intent was that the links on the left hand side would continue down the pages, which is not what currently happens. You would still keep the navigational links on the left hand side, but you are right on the home page it is duplicated.

Feedback: I would rather have it duplicated and still have that capability as we go through the other ones.

Comment: We though it would be a great enhancement to have that navigation available on the lower pages.

Gary: If you have comments send them to me via email. The feedback on the portal is a good thing but the feedback on the doc wont' be used at this time. So feedback on the portal and IFAP page would be good.

Gary: What I will do once I compile the comments...we will also have a transcript of this session. Please try and get me any comments by Wednesday.

Feedback: One more thing, it's probably more political than anything. It struck me that our first link was a direct loan link, I was thinking you might want to move something else.

Feedback: I think you are reading more into it than it is.

Feedback: At least give it some thought, maybe an order of what's used the most.

Feedback: They are in alpha order.

Kitty: Which order would you prefer

Feedback: I am thinking the ones that are used the most

Feedback: That would depend on the user.

Feedback: Just make them all alphabetical

Feedback: how about a link letting them know that there will be a tutorial letting people know that there will be instructions on how to customize my page, if that's what I want to do.

Comments: I have a distribution list, and I will compile comments and get a transcript of this session out to everyone.

- *Chatter* -

